PRINT RESET FORM

CBIS Christian Brothers Investment Services, Inc.
www.cbisonline.com

# Investment Account Application
*for Current Participants*

**Please type or print.**

**Please return this completed form by fax at 1-866-205-1499 (international fax: 303-825-2575) or by mail to:**

**Regular Mail:** Christian Brothers Investment Services, Inc., P.O. Box 3238, Denver, CO 80201-4838

**Overnight:** Christian Brothers Investment Services, Inc., c/o ALPS Fund Services 1290 Broadway, Suite 1100, Denver, CO 80203

**For assistance, please call 1-800-321-7194, Monday - Friday, 8:30 AM to 8:00 PM Eastern. For international callers, please call 720-279-3318.**

## SECTION 1: NEW ACCOUNT REGISTRATION

Organization Name and Number

Account Name

Name of Account Statement Holder

Address | City, State, Zip

Phone | Fax

Email Address

## SECTION 2: YOUR INVESTMENT

Note: Please separately include deposit instructions with your check or wire in addition to completing the form below. Initial Investment Amount $_____

| ALLOCATION DESIGNATION | |
|---|---|
| ❑ CUIT Flex Cash Fund | $ |
| ❑ CUIT Short Bond Fund (long-term investment) | $ |
| ❑ CUIT Opportunistic Bond Fund Class A | $ |
| ❑ CUIT Opportunistic Bond Fund Class B | $ |
| ❑ CUIT Intermediate Diversified Bond Fund Class A | $ |
| ❑ CUIT Intermediate Diversified Bond Fund Class B | $ |
| ❑ CUIT Balanced Fund | $ |
| ❑ CUIT Value Equity Fund Class A | $ |
| ❑ CUIT Value Equity Fund Class B | $ |
| ❑ CUIT Core Equity Index Fund Class A | $ |
| ❑ CUIT Core Equity Index Fund Class B | $ |
| ❑ CUIT Growth Fund Equity Class A | $ |
| ❑ CUIT Growth Fund Equity Class B | $ |
| ❑ CUIT Small Capitalization Equity Index Fund Class A | $ |
| ❑ CUIT Small Capitalization Equity Index Fund Class B | $ |
| ❑ CUIT International Equity Fund Class A | $ |
| ❑ CUIT International Equity Fund Class B | $ |
| ❑ Individually Managed Portfolio | $ |
| **TOTAL TO BE INVESTED** | **$** 0.00 |

## SECTION 3: E-DELIVERY

In order to reduce the environmental impact of printing and mailing hard copies, CBIS primarily uses e-mail to send its quarterly newsletter and other general correspondence to participants. Account statements and other information specific to your account will still be mailed in hard copy. Please indicate below if you agree to enroll in the e-Delivery program and receive occasional emails from CBIS. CBIS will not share your information with any other company.

Please indicate whether you agree to receive emails from CBIS.

❑ Yes, I want to receive information from CBIS via e-mail

❑ No, I'd prefer not to at this time

## SECTION 4: DUPLICATE STATEMENTS (OPTIONAL)

If you wish to have duplicate account statements sent to a specified party (e.g. consultant or broker), please include the following information. For more than one duplicate account statement, please attach a separate page, titled “Duplicate Statements”.

Statement Recipient Name

Address | City, State, Zip

Phone | Fax

Email Address

**Authorization to open an account is given by:**

Signature (Must be an authorized person on the Certificate of Resolution) | Date (MM / DD / YYYY)

Printed Name

*Christian Brothers Investment Services, Inc. serves as Investment Adviser and Administrator of the Catholic United Investment Trust (CUIT). CBIS Financial Services, Inc. is a wholly owned broker-dealer subsidiary of Christian Brothers Investment Services, Inc. The offer and sale of securities is made exclusively through CBIS Financial Services, Inc.*